



Enhancements **P.1**

New features **P.2**

Product enhancements –

Insure-IV Desktop application has been given a *fresh look*

You now have the capability of opening more than one system area simultaneously to facilitate and enhance navigation without influencing any functionality.

Document management

We have enhanced the management of documents in the system:

- *Document type* can be configured to default to a specific document category. This is specifically related to, but not limited to, simplifying your compliance process.
 - Your System Administrator needs to configure and manage this.
- *Document expiry date* is visible on all areas where a document is referenced.
 - This will make it easier to track which documents need to be replaced and can be addressed during your interactions with the client.
- *Filtering documents* allows to apply filters based on the owner of the document as well as the group permissions of the current user.

Task log types

Task Management has been updated with the ability to specify task log types applicable to a specific team.





New Features –

We continually strive to improve our product suite with new functionalities

Investment Portfolio

Our Investment Module has been improved substantially and now enables you to import or capture fund values per Investment.

This gives you the ability to build a full investment portfolio per client.

These values can be imported manually as and when needed or by using an automated process.

Tax Tables

We have consulted with an external Tax practitioner and subsequently implemented PAYE tax tables on Insure-IV.

This now allows the calculation of tax on a Recipient's current earnings.

You will have two choices for Tax calculation on a Recipient record:

- PAYE calculation
- Tax directive calculation

Default System Font

We acknowledge that each Company has its own identity and therefore added the functionality that allows you to choose your default font for all correspondence directly from the system.

Defects addressed

Defects are unfortunately inevitable in every system. We have fixed the following:

- Bcc-and cc-email fields on Automated process queues
- Client's age calculation using date of birth



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